Vermont Farmstead Cheese Marketing Study
January – March, 2006

Report prepared by
Jane Sakovitz-Dale
jsdale@adelphia.net

The **Vermont Farmstead Cheese Marketing Study** was made possible by an Argosy Foundation grant to the Vermont Housing and Conservation Board, in conjunction with the Vermont Farm Viability Enhancement Program. The purpose of the grant is to encourage innovation and diversity in Vermont agriculture, by developing new markets for high quality, nutritious, locally produced products.

Introduction

In 2005, twenty-seven (27) cheesemakers in Vermont were making "farmstead" cheese from the milk of animals pastured and raised on their own farms. Collectively, these cheesemakers made well over 650,000 pounds of small batch, hand-made, artisanal cheeses. Retailing in outlets across the state and across the country for an average $14.70 a pound (and some commanding as high a price as $25/pound), conservatively puts Vermont Farmstead Cheese at a $9-10 million dollar industry. These farmstead operations employ close to 50 people, provide a viable value-added product to dairy farms that struggle financially and contribute to the working landscape of Vermont in ways that are practical, sustainable and marketable. Farmstead, and other small scale cheese production, also signals Vermont's active participation in the "slow food" movement that is sweeping across the globe. Foods, made slowly, by hand and in small batches have captured the attention and the pocket book of consumers world-wide. These products are in demand.

Vermont today supports more farmstead cheesemakers per capita than any other U.S. state and is cited by many as the emerging epicenter of smaller American artisanal cheese producers [1]. With growth projected at 33% for those members of the farmstead cheese community who plan to grow, the economic impact to Vermont in 2006 will be at least $10.5 million. Americans are consuming more specialty cheeses than ever before – 5 times faster than total cheese consumption in the past 10 years.[2] As consumers continue to clamor for access to these high-end, high-quality and distinctive specialty cheeses, the potential for growth of the Vermont Farmstead Cheese industry shows absolutely no sign of weakening.

Will the production of farmstead cheeses provide a significant economic and tourist boost to Vermont? We can look westward for a parallel scenario. In just 40 years, California was able to transform its wine industry from producing unremarkable everyday wine to a collection of renowned valley vineyards whose labels are coveted across this country and beyond. Tourism to Napa Valley exploded. Allison Hooper, owner of Vermont Butter & Cheese Co, former president of The Vermont Cheese Council and current President of the American Cheese Society made this prediction in the late 1990's: that Vermont could become to cheese what Napa Valley has become to wine. The results of this study indicate that Vermont is well on its way to making this prediction a reality.

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[1] Howland, Daphne R.. *Say Cheese, Say Flavor*. Flavor and the Menu, 2004.
[2] Dryer, Jerry. *Cheese Becoming a U.S. Specialty,* , January 1, 2005, DairyFoods.com
(Specialty cheese is defined as "natural cheese that commands a higher price than a commodity cheese because of its high quality, limited production, value-added production or packaging techniques and/or value-added ingredients.")

Vermont Farmstead Cheese Marketing Survey and Process

In the first quarter of 2006, a Vermont Farmstead Cheese Study was conducted. The study consisted of surveying and interviewing cheesemakers, retailers, wholesalers, and other involved in the production, distribution or critique of the Vermont farmstead cheese industry.

A list of farms licensed to make cheese in Vermont was secured from the Vermont Department of Agriculture. Follow-up phone calls were made to ascertain which of these cheesemakers would be considered "farmstead," that is, making cheese with milk from animals on the same farm and to determine a threshold production level of 1,000 pounds per year. Surveys were sent, by certified mail to the 27 farms who met the study criteria. As an incentive, participants were offered a stipend of $100 for completion of the survey. Of the 27 mailed, 23 completed surveys were received for an 85% return rate. A list of participating cheesemakers can be found in ***Appendix A.***

On Site Visits:

Additional on-site visits were made to the following:

1) cheesemakers who began business as cheesemakers and who had not previously sold fluid milk
2) cheesemakers who had previously sold fluid milk but who had transitioned to an all-cheesemaking operation
3) cheesemakers who continued to sell fluid milk as well as making and selling cheese.
4) distributors
5) retailers

Phone and E-mail Surveys:

Phone calls and e-mail exchanges were also conducted with retailers in major metropolitan areas as well as across Vermont; small and large distributors on both coast; restaurateurs, food writers, and representatives of national and international movements and markets having to do with farmstead cheese and an academician who has studied the anthropological leanings of people engaged in dairy farming and attendant activities. A list of additional interviewees is found in ***Appendix B***.

Information obtained in the written survey was complied in two ways:

1) composite information from all 23 respondents
2) information separated by type of animal being milked

Profile of Cheesemaker Respondents

The profile of people making farmstead cheese in Vermont is hardly uniform. Some have come to cheesemaking after decades of dairy farming and are looking to cheese to supplement farm income. Some are self-limiting cheesemakers, in that they make a limited amount of cheese, by design and often seasonally, for local distribution and consumption. These individuals may not depend on cheese sales for a significant portion of their sustenance and do not intend to grow their business beyond current limits. Others have entered the cheesemaking business as entrepreneurs and intend to derive their entire livelihood from this venture and are projecting annual increases in production that range from 33- 80%.

The cheesemakers represent a spectrum of ages, backgrounds and education levels. They include multi-generational Vermonters as well as more recent transplants to the state. They are male and female; family farmers and single entrepreneurs. The common traits they share are these: a commitment to the working landscape; a strong work ethic; an eagerness to see themselves as contributors to sustainable agriculture and quality food production in Vermont; a passion for cheesemaking, and a willingness to share their successes, challenges and concerns with their fellow cheesemakers.

Award winning

Vermont Farmstead Cheeses (along with those cheeses in Vermont that are not farmstead) are award winning cheeses. In the past three years, in American Cheese Society competitions, Vermont has only trailed behind the dairy giants – Wisconsin and California – in awards, taking 28 awards in the 2005 competition alone. See ***Appendix C*** for a list of 2005 Farmstead winners.

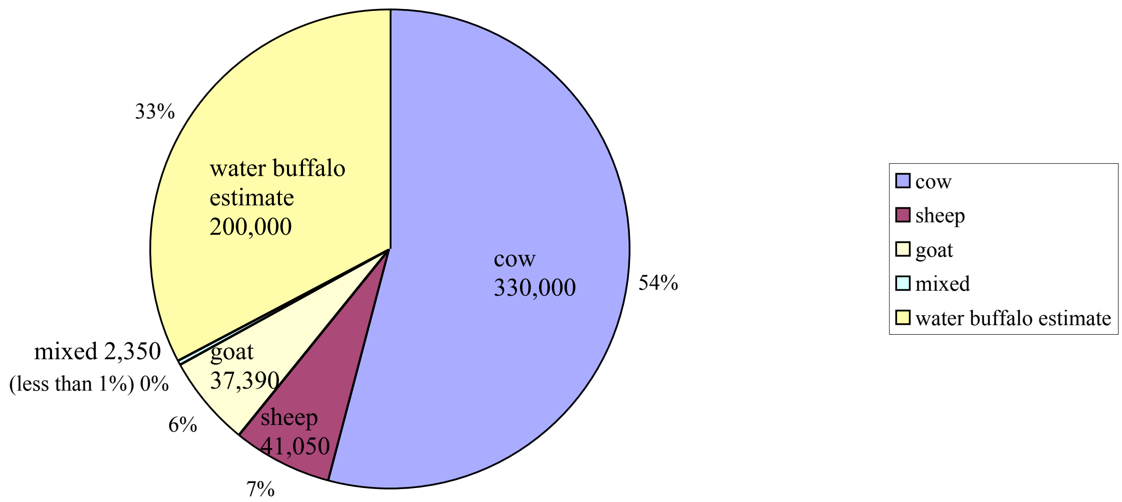
Survey quick facts:

- The longest continuous cheesemaker in the sample has been making cheese for 26 years; the newest began in 2005.
- Half of those cheesemakers surveyed have only been making cheese since 2000
- One-third have had no formal cheesemaker training
- The 23 responding cheesemakers are producing over 100 varieties of cheese (See ***Appendix D*** for a list)
- 80% of Vermont farmstead cheese is raw (unpasteurized) milk cheese
- 16 of the 23 responding cheesemakers make ONLY raw milk cheese
- Fewer than 1600 animals are providing the milk for over 600,000 lbs of farmstead cheese
- Two-thirds of respondents (15) are currently making less than 10,000 pounds of cheese a year.
- 43% of cheesemakers (10) are primarily making cow's milk cheese and these cheeses constitute more than half of the total of Vermont farmstead cheeses being currently produced including both the least expensive and the most expensive cheeses identified
- 30% of cheesemakers (7) are making sheep's' milk cheeses
- 26% (6) are making goat's milk cheese
- 7 cheesemakers are currently also engaged in selling fluid milk while 17 are not
- All but one of those selling fluid milk are selling cow's milk
- Nearly one-third of all respondents (7) rely on cheesemaking for over 75% of their total gross income
- 36% of Vermont farmstead cheese sales take place in the 3rd quarter (July – September) followed by 32% in the 4th quarter (October – December)

Who's Making What?

The following chart shows the percentage of farmstead cheese by milk type in 2005[3]

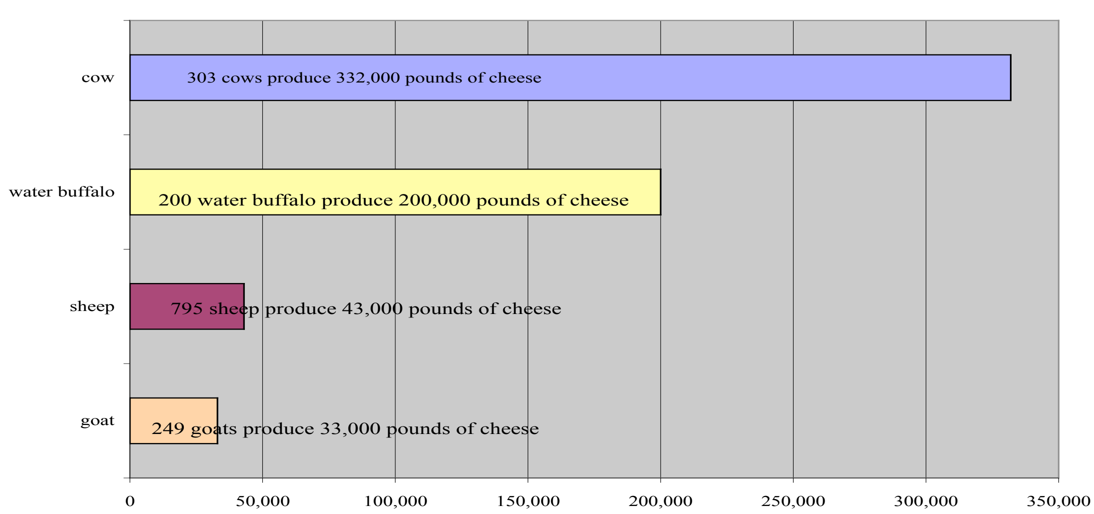
Chart 1. Quantity and % of total pounds for each type of cheese



Animals in Farmstead Cheesemaking in Vermont

Milk yield varies by animal species. The typical ratio for cows is 10 pounds of milk to 1 pound of cheese. Other species and factors such as butterfat content and seasonal fluctuations in milk production come into play when determining the milk to cheese ratio[4]. Based on responses to this survey, there are approximately 1600 animals being milked for the production of farmstead cheese in Vermont today. Herd size has increased in the last three years for 65% (15) of survey respondents. Goat cheese makers report the most significant growth with four out of six reporting an increase in the herd by 50% or more. Six respondents, all cow dairy cheesemakers, report no change in the size of their herds in the past three years. Two additional respondents, also cow dairies, report a decrease in herd size by 10-25%. The following graph showing how many of each type of animal is needed to produce the corresponding amount of farmstead cheese.[5]

Chart 2. Quantity of cheese by animal type



[3] NB: Woodstock Water Buffalo chose not to participate in the survey. However, as the largest farmstead cheesemaker in VT, it was felt important to include their production totals. This number is estimated based on information available on their web site. It has not been verified.

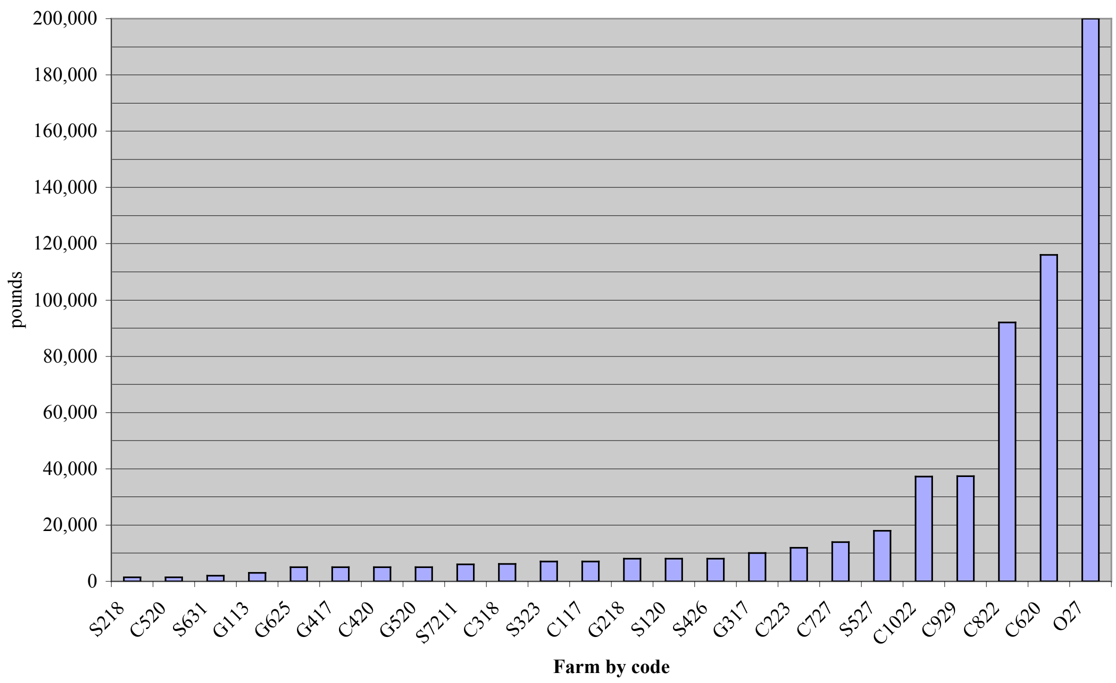
[4] For example, Sheep start the milking season 4:1 and end it at roughly 2:1. Goats are 6:1 typically.

[5] The distinction – between farmstead and non-farmstead was made for this study – but does not appear to be made in the marketplace. Other VT cheesemakers in the cow and goat category that are making substantially higher quantities, though not on the farm, are also perceived as "artisan cheesemakers" by those who distribute and sell cheese.

Size and Growth of the Vermont Farmstead Cheese Industry

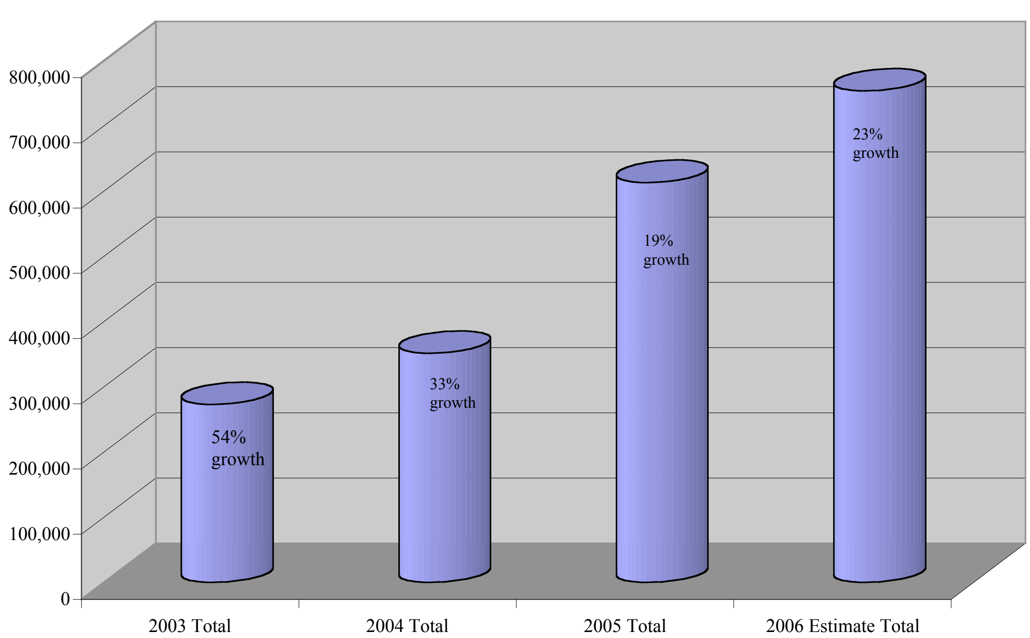
Although some cheesemakers have been making farmstead cheese for sale in Vermont since the 1980s, there was a significant growth in the industry, both in terms of numbers of producers and volume of production in the late 1990's. Shown below, the range for production in 2005 was from a low of 1,400 to a high of 200,000, with a mean of 7,000 pounds.

3. Individual farm production: Mean is 7,000 pounds



Growth in Vermont's farmstead cheese production since 2003 has been double-digit every year. Overall, projected growth for 2006 is 23%. Those projecting to grow by 50% or more in the coming year are among the newest producers and only one of these also plans to continue to sell fluid milk. In 2006, the mean production is projected to be 10,000 pounds – up from 7,000 in 2005. Collectively, they will be making in excess of 730,000 pounds of cheese this year. Still, only six of the 23 producers surveyed will be making 20,000 pounds or more.

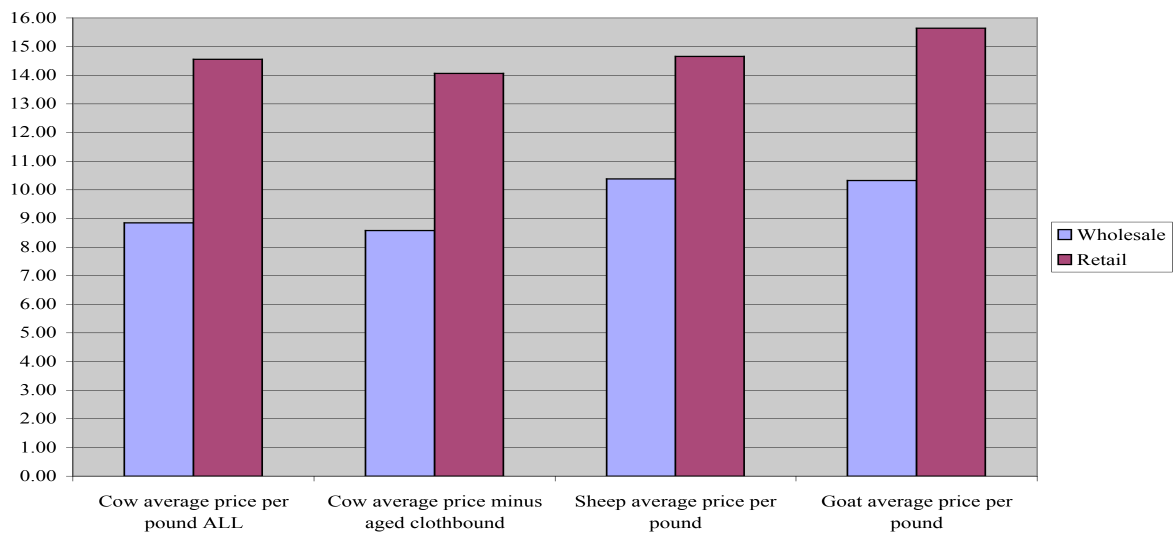
Chart 4. Overall growth in production



The Cost of Cheese

The average wholesale cost across the over 100 varieties of cheese included in the survey was $9.59 per pound wholesale; the average retail cost was $14.70. (See ***Appendix E*** for a complete list of cheese by price). Factors that contribute to a more expensive cheese include: how and in what way it is aged; the type of rind; and the market value of the label. The chart below shows the average by milk type as well as by wholesale and retail.

Chart 5. Lowest to highest retail and wholesale prices



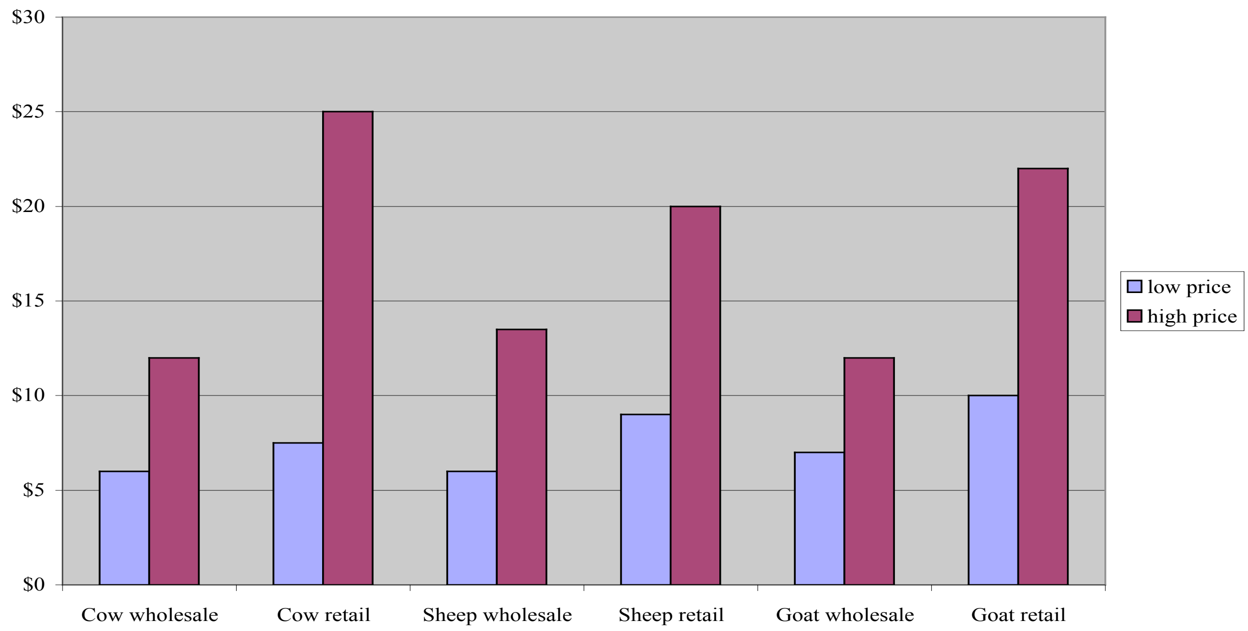
The widely held belief that sheep and goat's milk cheeses are more expensive across the board than cow's milk cheeses was born out by this survey. However, there are some specialty, cow's milk cheeses – such as clothbound cheddars – that are among the most expensive of all.

A tale of two cheeses

Both the least expensive ($7.50 pound retail) and the most expensive ($25.00 pound retail) cheeses represented in this sample are raw, cow's milk cheeses (see next chart for range of prices by type). The less expensive one is even organic. What separates the two are their uniqueness, age, appearance and market demand. The less expensive of the two is packaged in small quantities, cryovac-sealed and ready for market in 60 days. This cheese is sold out of the dairy case alongside other "everyday" cheeses where it may not fully benefit from its farmstead/artisanal status or get a premium for its "organic" designation. Whereas, the other cheese, made in 30 pound wheels is a specialty, washed rind cheese that ages for up to 18 months. This cheese has found a specialty audience among high end restaurants in major U.S. cities on both coasts. One looks (and tastes) expensive and is. The attributes of the lesser price cheese – raw milk, small batch, artisanal and organic – are possibly lost in its more commercial, "everyday" appearance.

The following chart shows the range of wholesale and retail costs by type of cheese.

Chart 6. Lowest to highest retail and wholesale prices



The cost of making cheese

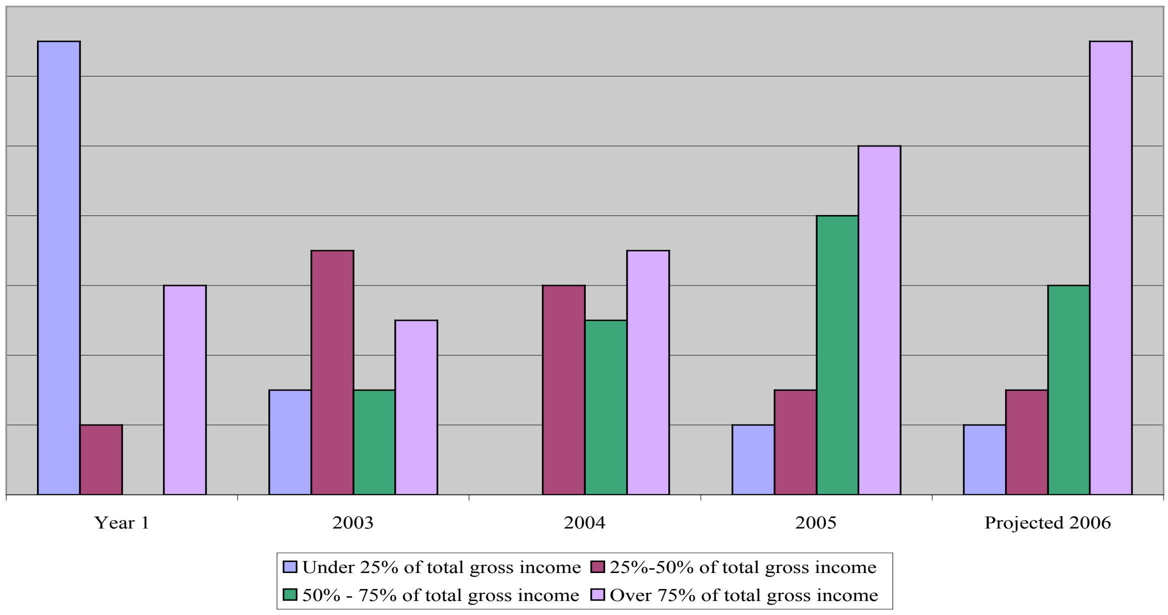
The reported cost of making cheese varies widely among the 11 cheesemakers who responded to this question. Some included the cost of their own labor in their calculations, while others only include the cost of paid labor. This discrepancy alone puts the validity of the numbers in question. There are other variables, such as the cost of aging cheese, variability in the cost of feed (including organic), utilities, property taxes, and the cost of maintaining and replacing stock, all of which also add to the complexity of the equation. Marketing costs were cited by some and to a lesser extent, distribution costs since these are usually born by the customer.

That said, guestimated costs for producing a pound of cheese ranged from a low of $3/pound to a high of $12/pound with the average cost reported at $6.72 per pound. The most significant items of expense were: the cost of making milk (including the cost of feed); labor; utilities including fuel, property taxes, and the cost of aging cheeses which can be considerable. The cost of handling and managing cheese throughout the aging process is estimated to cost .$30-.50 per pound per month, which can add well over $100 to a 40 lb wheel of cheese aging for 9 months.

Cheesemaking As a Source of Income

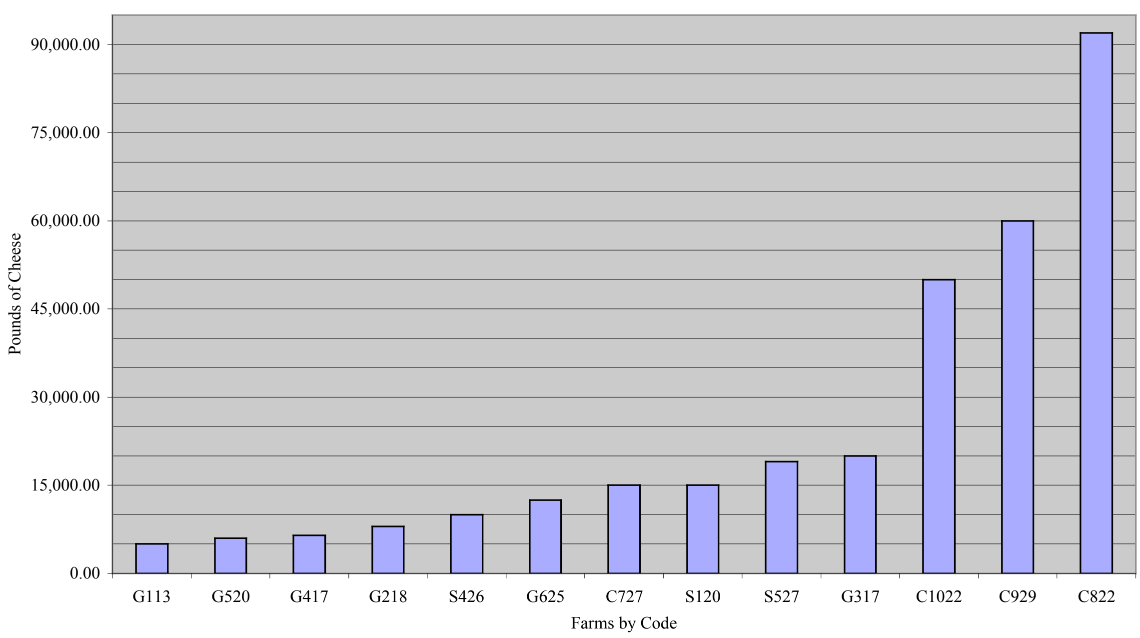
This survey did not attempt to quantify how much income can be made from cheesemaking. Rather, it asked respondents what percentage of gross income was derived from selling cheese in year one of operations; whether this percentage has increased or decreased over the past three years and how it is projected for the coming year. Subsequent to the written survey, a number of cheesemakers were asked if their business was "profitable." The majority of those who responded reported a very small margin of profit after three-five years of operations. The following chart shows the "percentage of income" trending data: in each of the past three years, cheesemakers have relied on the sale of cheese for a greater portion of their total income.

Chart 7. % of total gross income derived from cheesemaking



It is worth noting that eight of the 13 respondents who said that 75% of their income will come from cheesemaking in 2006, started cheesemaking in 2000 or after. These 13 producers have productions estimated ranging from a low of 5,000 pounds to a high of 92,000 pounds with an average production of 25,000 pounds and a mean production of 15,000 pounds.

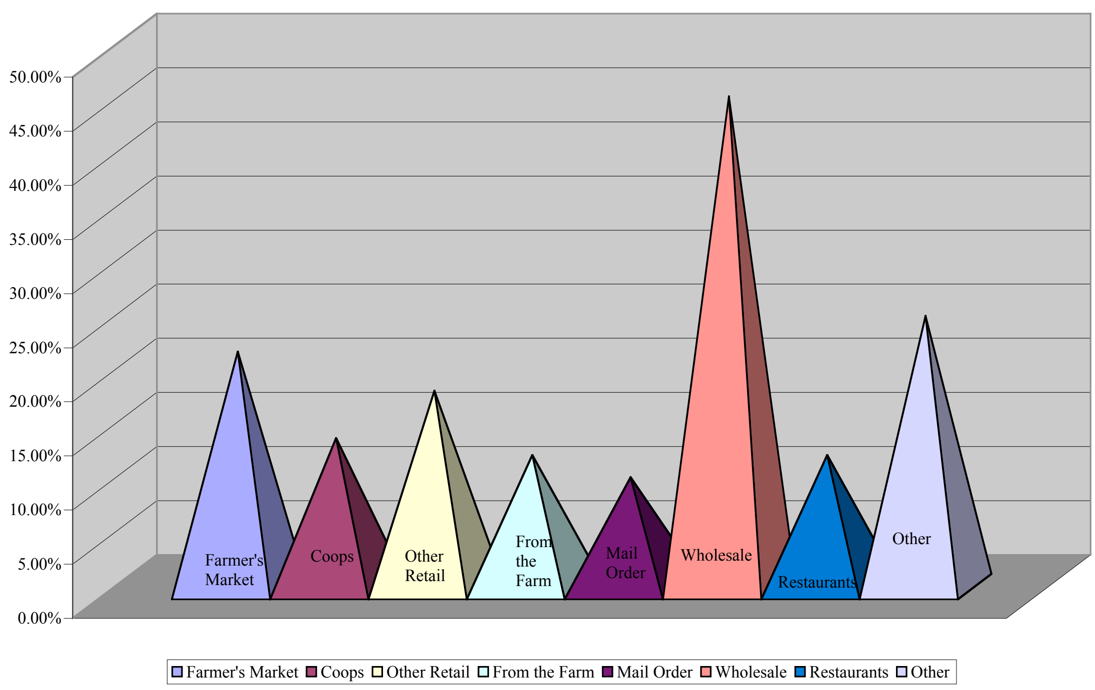
Chart 8. Cheesemakers that will rely on cheesemaking for 75% of their income in 2006: Mean is 15,000 pounds



Bringing Cheese to Market: Distribution & Sales

Bringing cheeses, often fresh and fragile, from the farm on which they originate to the point of purchase is a tricky business. Distributors can bring cheeses further a field but they do so at a price; 50% (12) of respondents reported working with a distributor at the present time. Many variables come into play when determining how best to bring a cheese to market. Cheesemakers wrestle with the reality that retail and Food Service sales provide them with a larger profit margin than do sales accomplished through a distributor or selling wholesale themselves but selling direct is a labor intensive activity on top of the labor intensive act of making the cheese itself. Some feel that the strength of their cheeses – which reflect the local character of the place in which the animals graze and the cheese is created, can best be realized through local sales and distribution. For these and other logistical reasons, approximately 50-60%[6] of Vermont farmstead cheese is staying in Vermont. Of this, forty-five percent (45%) is being handled at the wholesale/distributor level which includes 14% of sales to Coops and 18% to other retail outlets. Looking at the direct-to-consumer picture shows the importance of the Farmer's Market. Here, an average of 22% of Vermont farmstead cheese is being sold with two cheesemakers reporting 60% of their sales in this venue. Overall, 12% is being sold from the farm; 10% is sent mail-order, and 12% is going to food service/restaurants. As a rule, the smaller the producer, the more likely the cheese is to be sold nearby, as is the European model. This model works because the cheese is fresh and the price is better than at retail. The following chart compiles responses to the question: Where is your cheese going in state?

Chart 9. Distribution of farmstead cheese within Vermont



For the most part, those cheesemakers who have a relationship with one or more distributors are pleased with them. Distributors can be very effective in opening new markets for Vermont-made cheeses. They are selective, in that they want to ensure that the product is of a caliber to compete with other domestic and international offerings. But they are also tremendously supportive and often go beyond the expected in getting Vermont farmstead cheeses in front of a potential audience. They are strong advocates for the Vermont farmstead industry; know the products and represent them well among their respective clients and customers. The most significant downsides to using a distributor are: 1) the cheesemaker may have to compromise on price to accommodate the distributors mark-up on the cheese and 2) the cheesemaker no longer has a direct relationship with the individual retailer/restaurant/customer.

All that said, distribution, and the attendant issues of freight and transportation costs, was cited directly and indirectly by cheesemakers, distributors, food service and retailers as posing problems and opportunities. This is particularly true for those cheesemakers who aspire to penetrate distant markets. Getting the product to its end destination is a timely-fashion and in a state that reflects the full integrity of the product and satisfies the retailer's expectations and regulations is not easy. Not even within the borders of the state of Vermont is this being accomplished in a cost-effective and efficient manner.

[6] This is an educated guess. Since 12 cheesemakers work with one or more distributors who have the latitude to sell the cheese to retailers in or out of state, the 50-60% figure is comprised of sales from the farm and at Farmer's Markets plus in-state coop sales, though many coop sales are accomplished through use of a distributor. ***See Appendix F*** for details.

Restaurant-Direct (Food Service) Sales

Eighty-three percent (19) of respondents said they sold cheeses directly to restaurants both in Vermont and out-of-state. Almost half of respondents have 5 or more restaurants accounts. It is also worth noting that cheese may, and does, reach Food Service accounts via distributors as well. The benefits of selling-direct to Food Service include: better profit margin; good exposure; consistent demand. Drawbacks included delivery issues; low volume, small orders and oftentimes demanding chefs who may not be sympathetic to availability fluctuations. Interviewed Chefs were uniformly enthusiastic about the quality and desirability of Vermont-made cheeses. In-state, they acknowledged typically paying $8-12/ pound and periodically paying as much as $18/pound for the cheese. Out-of-state, prices were cited in the $13-16/pound range. Cost and availability were cited as the primary concerns.

The Retail Picture[7]

The retail picture for the sale of Vermont farmstead cheese differs between in-state and out-of-state and even among major markets based on interviews with retailers across Vermont as well as in Boston, Providence, Connecticut, New York City, Chicago, Washington, DC and San Francisco. In-state, the market is more price sensitive; out-of-state, quality, consistency and distinctiveness generally override price as the dominant consideration. Based on a limited number of interviews, New York City and the West Coast seemed least constrained by price. (***see Appendix G***)

In state, Vermont retailers very much want to provide their customers with locally made products that support the agricultural lifestyle. Across the board, they find Vermont farmstead cheeses of a quality equal to or better than domestic and international offerings of the same type. They also find the cost to be equal to or greater than the alternatives. Price is a barrier for some in-state retailers. The cheese buyer from one of the largest health food market in the state said that, even among customers who look to cheese as a staple in the diet, "Vermonters can't afford to buy Vermont farmstead cheeses as their table cheese. It has to be a "special" purchase." One buyer said that she cannot afford to pay more than $10/pound wholesale for any cheese, while another cited the figure of $13/pound as an upper limit. The latter added the comment that the cost of procuring small amounts of farmstead cheese from a large number of producers is inefficient and costly – creating a financial burden passed on to the customer. Several mentioned the need for a better coordinated system of delivery. Many cited consistency and seasonality as on-going challenges. Still, Vermont farmstead cheeses have a strong following among these retailers who acknowledge they are carrying more Vermont labels every year.

Retailers out-of-state, also varied in their responses. These ranged from those who said they can't get enough Vermont farmstead cheese – at ***any*** price to those who talked about increasing costs, lack of consistency and, to a lesser extent, availability as significant problems. One national food chain cheese buyer spoke specifically about the challenges of small producers getting their product to market in a state that meets or exceeds federal guidelines and consumer expectations. Among those retailers interviewed, the demand for Vermont's farmstead cheeses was high, especially in New York City and on the West Coast. Retailers in these two locations were also the most willing and able to pay a higher wholesale cost for these cheeses with "typical" prices quoted in the $12-$16 range. The more special the cheese, the more willing the retailer was to negotiate price. As one mid-west distributor put it, "Everyone wants that unique taste experience." Another West Coast distributor added, "There are more people who want great cheese than there is great cheese to give them." If showcased appropriately, these distinctive cheeses can command retail prices well above $20. Even though they may be worth the price, one distributor talked about the ever-increasing competition for limited shelf-space as a factor in edging out the most expensive offerings. She asserted that from a consistency and cost perspective, "European cheeses appear to hold cache through the middle market." Whereas, the upper market, she asserted, is more sensitive to flavor and uniqueness.

[7] The distinction made between wholesale and retail was confusing to several respondents who sell directly at their wholesale price to many retailers and restaurants but considered these outlets "retail" for the purpose of the survey.

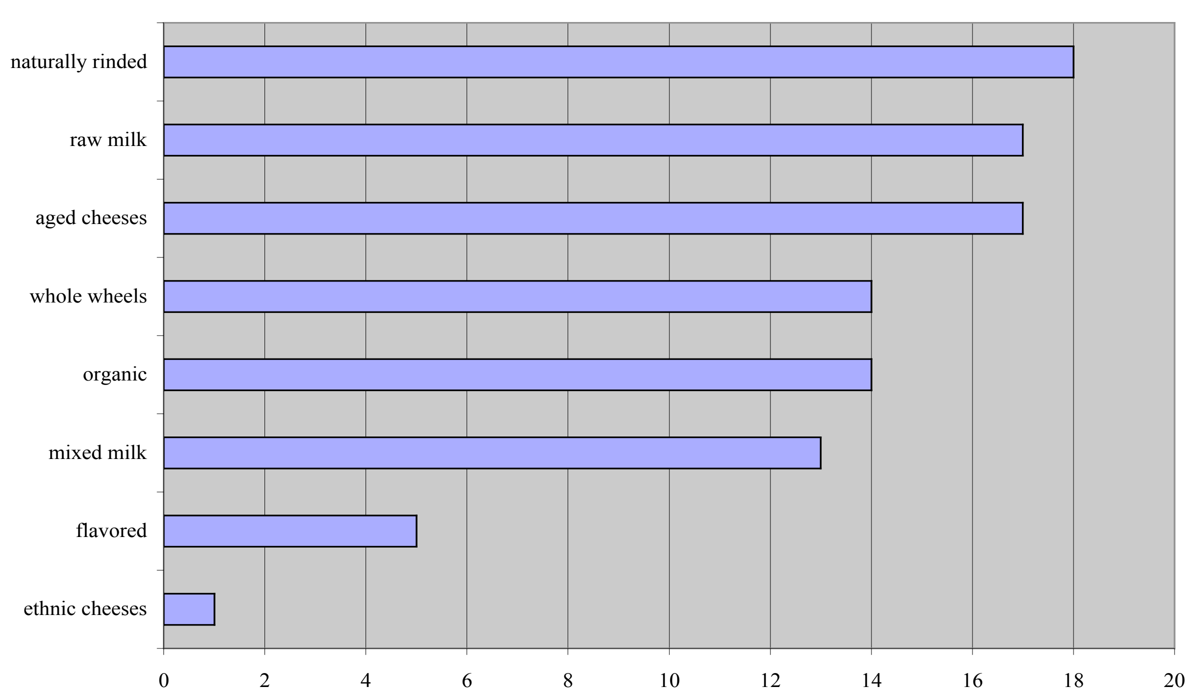
Challenges and Opportunities

Respondents were asked what the greatest challenges were in entering into cheesemaking. Responses to this open-ended question clustered around the following themes: lack of capitol; lack of experience and available technical assistance; and working through the state bureaucracy and meeting regulations. On-going problems include: money (including maintaining cash-flow); finding affordable, reliable labor; and space limitations (both for animal grazing as well as for producing and aging cheese).

Forty-percent (40%) of respondents said that the main factor holding them back from additional sales and success is lack of product. More than 2/3rds of respondents say they sell 100% of product within the year it is made. Those who do not include those who carry over a portion of inventory for aging. Lack of product is linked most directly to limitations such as the size of the farm and/or herd; the cost of outside labor; and the seasonality of certain products. Several cheesemakers remarked that they could include production if they bought additional milk, but expressed concern that this would, by definition, preclude them from calling their product, "farmstead." However, distributors and retailers seemed to draw less of a distinction between farmstead and artisanal – or specialty – cheese production than did the cheesemakers themselves. Other factors cited by cheesemakers as barriers to success were: lack of time and money; inadequate production facilities, and the scarcity of skilled, affordable labor. Marketing and sales, in so far as these are time intensive and costly undertakings, and product distribution were also cited.

When asked whether there was a point of saturation for in-state cheese sales, one out of every two respondents said "yes" citing cost and consistency among the reasons. But only one in five thought there was a point of saturation for sales out-of-state. The reasons most frequently cited for more out-of-state opportunity were: the growing interest in artisan cheeses; national trends in cheese consumption; and the overall quality and reputation of Vermont cheeses. Cheesemakers were also largely positive about the growing market for naturally rinded, raw milk and aged cheeses as shown below. When asked to indicate which "other" cheeses have a growing market, the most common responses were washed rind and soft-ripened cheeses. Retailers interviewed also reinforced that they would like to see more soft-ripened and washed rind cheeses coming out of Vermont.

Chart 10. What cheese is there a growing market for?



Observations and Recommendations

The areas most frequently identified by cheesemakers and non-cheesemakers alike as areas of weakness, concern and/or opportunity were:

1. Safety
2. Quality & Consistency
3. Competition within the "artisan" category
4. Production Volume
5. Transportation of cheese to market
6. Labor

1. Safety

Many cheesemakers are advocating for self-imposed industry standards that will ensure that farmstead cheeses coming out of Vermont are safe to consume. This is particularly important since Vermont boasts the largest number of raw milk cheese producers in the country. In the United States, the sale of raw milk cheeses that are aged less than 60 days is illegal, and the Food and Drug Administration has threatened in the past to eliminate the production of raw milk cheeses altogether under the guise of "public health." However, in more than 50 years of scientific literature, there are virtually no reports of illness outbreaks from aged raw-milk cheese that can be blamed on the raw milk.[8] "Cheese can be contaminated at any stage from farm to table: in the milking barn, in the dairy, in the aging room or at the retail counter"[9]. Producers are, understandably, concerned about safety and the fear that any breach of safe production by one producer would adversely affect the entire Vermont artisan cheese industry. Small producers, already burdened by the cost and complexity of production are not looking for additional regulations. That said, there are a number of efforts underway to ensure cheese safety.

■ Self-imposed safety standards: One national, member organization, Slow Food USA, has long championed the right for American producers to make raw milk cheeses. Through their "Presidia" Program, Slow Food has partnered with raw milk cheesemakers around the country to develop voluntary safety guidelines that exceed FDA and European Union regulations. Drafts of the "Raw Cheese Milk Production Protocol" will be shared at the 2006 American Cheese Society meeting to be held in July. The protocol will include standards for managing land, animals, milk quality and cheese quality. Vermont producers of raw milk cheeses who meet certain criteria may join Slow Food's Raw Milk Cheese Presidium. This would allow them to be officially recognized for their sustainable production practices and commitment to taste and quality – which Slow Food also focuses on. These new standards would both reassure consumers and strengthen the scientific foundation for production.

■ Ensuring milk purity by testing for somatic cell counts ("somatic cell count" refers to the number of dead white blood cells, which indicate infection.). In Vermont, testing milk to be made into cheese is expensive and voluntary. For these reasons, few small cheesemakers currently avail themselves of testing options.

■ Meeting HACCP (Hazard Analysis and Critical Control Point) guidelines**.** This is a voluntary science-based system promoted by the FDA to ensure that food safety hazards are controlled to prevent unsafe food from reaching the consumer. While being HACCP-certified is enormously complicated and costly, cheesemakers can be voluntarily HACCP compliant to advance their case for safety. University of Vermont Professor and Vermont Institute for Artisan Cheese Co-Director, Catherine Donnelly, PhD., has said: "The greatest threat posed to the safety of cheese is due to post-process environmental contamination. In that light, mandatory HACCP plans in dairies would probably do more to safeguard public health than mandatory pasteurization."

[8] Fletcher, Janet. *The Myths about Raw-Milk Cheese*, NAFST, www.specialtyfood.com
[9] Ibid

2. Quality & Consistency

Each batch of farmstead cheese is unique. Even though the market recognizes this reality they expect and demand that the product will be consistent – that it will look the same, be of equal quality, and, for the most part, taste the same from one week to the next. Experts agree that consistency of product logically flows from observing rigorous production and safety protocols. Lack of consistency hurts the individual label and the industry in total. If the buyer cannot count on a cheese remaining consistent, it is easier to look elsewhere – especially at the prices that farmstead cheeses now command. Roughly half of cheesemaker respondents say they have discontinued one or more cheeses, mostly because of quality issues and most claim to have "thrown out" cheeses from time to time because of poor results. One industry expert suggested that, rather than disposing of lesser quality cheeses, cheesemakers re-label and reduce the price on cheeses that may not live up to their taste or quality expectations but may be welcomed in the marketplace as a reduced-cost, artisan cheese. Others expressed skepticism at this approach.

3. Competition within the Artisan Cheese Category

Although Vermont enjoys a stellar reputation borne out by an ever-growing number of awards and accolades, the competition for the high-end cheese buyer is fierce. As one West Coast distributor remarked, "The real estate for showcasing cheese is limited for those cheeses commanding the highest prices." Many distributors remarked that it is the "back story" behind Vermont farmstead cheeses that brings consumer to these labels and that it is the cheese itself that keeps them coming back. Consumers love the idea of eating a unique cheese that was hand-made in small batches on a farm in Vermont especially if it is both delicious and scarce. One mid-west distributor remarked that there is something about Vermont milk that sets these cheeses apart from other domestic cheeses. Still, there is significant competition for the high-end customer within the artisan cheese category and new producers coming on-line all the time to try to capture a portion of this growing, but finite market.

The two largest cheese producing states, California and Wisconsin, have spent millions of dollars in promoting their dairy industry, with special emphasis in recent years on cheese. The Real California Cheese campaign claims that "Great cheeses come from happy cows and happy cows come from California." These televised ads are regularly seen in the VT television market.

The economies of scale in California literally dwarf the Vermont dairy industry. Although there are only 10 farmstead producers in California, they are huge in comparison to those in Vermont. One giant, Fisacalini Cheese of Modesto County milks 1,500 cows and produces 400,000 pounds of "farmstead" cheese each year. All told, California produces 1.4 billion pounds of cheese. Milk production also reached a record high in 2005, totaling 37.5 billion pounds making California the nation's leading milk producer. Between 1985 and 2004 California cheese production increased four-fold and milk production more than doubled. Half of California's milk supply goes into cheese production. West Coast distributors say they find it hard not to promote more local farmstead cheeses in lieu of those that have to travel 3,000 miles to get on the consumer's plate even though the Vermont cheeses have an illusive quality that sets them apart.

The Wisconsin Dairy Industry is similarly huge. As the largest cheese producer in the U.S. (producing 27% of the US total) Wisconsin Dairy has a $20.6 billion impact on the state's economy and employs 160,000 people. With 90% of its fluid milk production going into the making of cheese, Wisconsin has long made claim to being the dominant player in the U.S.cheese market. This status is reinforced through their hosting of the annual World Championship Cheese Contest each spring. Wisconsin is not reluctant to spend money to promote cheese – an estimated $19 Million (70% of their $25 million dollar budget) according to a Wisconsin Milk Marketing Board executive who added that California spends even more.

In terms of production and promotion, Vermont should not even be on the national artisan cheese radar screen. But our reputation for excellence and our status as the state with the largest number of artisanal and raw milk cheese producers puts us front and center in terms of capturing the attention and loyalty of distributors, food service outlets and customers. Some suggestions for enhancing competition within our category include:

- more active support and promotion of farmstead and artisanal by the state of Vermont and Department of Agriculture
- support from the state to the farmstead cheese producers in terms of technical assistance, streamlining the process for becoming a licensed cheesemaker and meeting regulations, and transportation of cheese to market
- more private/grant money allocated to the promotion of Vermont cheese

4. Production Volume

Despite the fact that Vermont produces a small amount of farmstead cheese compared to other states, demand for the limited supply remains high. One mid-west distributor called for Vermont cheesemakers who want to compete on a national level to recognize the importance of scaling up their operations in order to satisfy demand. One New England distributor said he calculated that cheesemakers would need to produce at least 20,000 pounds a year in order to meet demand and generate profit. As noted earlier in the survey, only six of the 23 cheesemakers surveyed will reach this threshold in 2006.

5. Transportation of cheese to market

Getting Vermont farmstead cheese from the farm to the plate of the end-user is inefficient and costly. This is true whether the cheese is moving across the state or across the country. Several of the larger cheesemakers have developed a system that works for them. But many small producers continue to struggle with the cost and challenge of shipping a perishable product. And this challenge has clearly impeded their success. One Vermont retailer spoke about receiving several small shipments of farmstead cheese each week, each creating paperwork, labor and costs to be passed on to the consumer. Some of the recommendations made by interviewees to help address the problem included:

- a private or state-sponsored refrigerated truck to make routine pick-ups and deliveries from cheesemakers to restaurants, co-ops and other retail outlets in VT
- regional consolidation of product [10]
- negotiated group-rate shipping contracts with Fed Ex etc.
- a correspondent warehouse for FOB in NYC. (Freight On Board determines who is liable for the freight risks/costs. Having a product shipped F.O.B/New York means that the cost of getting product to New York - natural point of distribution for other U.S. locations- is factored into the initial cost. From there, additional transportation costs would shift to the distributor/buyer).

6. Labor

Affordable, reliable labor was cited repeatedly as an item of significant cost and concern. Seven, or 30%, of the cheesemakers responding said they employ one or less FTE, including self. Another 30% report having two FTEs including self. 20% reported to having three or more employees including self. Only one of the 23 cheesemakers who responded to the survey indicating employing five or more people. Seasonal, unpaid or low-paid interns were seen as both a help and a burden. Training someone takes time and effort. “And then they leave,” said one cheesemaker. Ideas that were advanced to address the labor issue included:

- Developing a state-sponsored apprenticeship program, such as in CA, WI & NY
- Developing a curriculum for cheesemaking in conjunction with NECI, VTC or other Vermont-based institutions.

[10] This has happened to a limited degree in south/central Vermont where Taylor Farm serves as a drop-off point and transportation hub for other Vermont cheeses, making distribution to major markets more time sensitive and cost-effective.

Conclusions

Farmstead cheesemaking is bringing awards, publicity, customers and visitors to Vermont. It is providing a living for dozens of Vermonters and is bringing millions of dollars into the Vermont economy. It is labor-intensive, repetitive, costly, time-consuming and exacting. It is subject to weather conditions and market fluctuations. It is fragile and unique. This survey has not tried to definitively answer the question: is Farmstead Cheesemaking a profitable venture? But two things are clear: cheese made from milk is far more profitable than the fluid milk itself. The same hundred weight of milk that sells for $15-$20 can easily yield at least $60 - $100. worth of cheese. Upfront costs of setting up a cheesemaking operation vary from a low of $40,000 to a high of $150,000. Certainly, those cheesemakers who once, or continue to sell a portion of their milk yield as fluid milk have seen the much higher profitability of cheese. For this reason, some have chosen to divert a greater percentage of milk to cheesemaking and have seen a resulting positive impact on the bottom line. One Vermont cheesemaker contends that struggling farms could raise their income from near poverty level to $100,000 a year if they converted the milk from the 25- 35 animals they already own into making an artisanal cheese. On paper, this works.

But with cheesemaking come other lifestyle considerations. Researchers, including MIT Anthropologist Heather Paxson have looked at the cultural differences among farmer-cheesemakers and have found that farming and cheesemaking each require a distinct set of skills and sensibilities that must be balanced. The farmer who is used to the quick cash-flow of daily milking and shipping fluid milk may not like the longer-term process of making cheese that is often times held-over to age before it can be sold. Selling the cheese is also time consuming and labor intensive and requires personal attributes - including marketing skills - that may not come easily to the typical farmer. Will some dairy farmers thrive as cheesemakers? Absolutely. But it is a natural value-added for any and all dairy farmers? Probably not.

Cheesemaking is an exacting skill. It requires passion, commitment and scrupulous attention to cleanliness and detail. To fully succeed, it requires a focus on herd management, milk quality, and rigorous standards. Moreover, it assumes the development of a distinctive product that is ambitiously and aggressively marketed at reasonable cost and in sufficient quantities to meet market demands once created. Having the Vermont Cheese Council and the University of Vermont's Vermont Institute for Artisan Cheeses nearby for technical support, education, and marketing assistance contribute to making cheesemaking in Vermont a viable venture. Collaborations with national organizations such as Slow Food USA to help meet high standards and ensure the safety and quality of the cheeses coming out of Vermont also enhances the likelihood of continued success and growth of the Vermont artisanal cheese industry. Cheeses developed on this model and in this supportive environment have an almost unlimited national market.

Appendix A: List of Cheesemakers

Name of Farm	Contact	Mailing Address	City		Zip	Phone	E-mail
Consider Bardwell Farm	Russell Glover & Angela Miller	1333 VT Rt 153	W. Pawlett	VT	05775	802-645-0932	angela@milleragency.net
Blue Ledge Farm	Hannah Sessions & Gregory Bernhardt	2001Jerusalem Rd	Salisbury	VT	05769	802-247-0095	blueledge@hotmail.com
Bonnie View Farm	Neil Urie	2228 S. Albany Rd	Craftsbury Common	VT	05827	802-755-6878	bonnieview@pshift.com
Cobb Hill Cheese	Judith Bush & Gail Holmes	3 Linden Drive	Hartland	VT	05048	802-436-1246	philip.w.bush@dartmouth.edu
Dancing Cow Farmstead Cheese	Karen Gertz	237 Holstein Drive	Bridport	VT	05734	802-758-3267	kgertz@gmavt.com
Doe's Leap Goat Farm	George Van Vlaanderen & Kristin Doolan	1703 RT 108 S	E. Fairfield	VT	05448	802-827-3046	doesleap@pshift.com
Green Mountain Blue Cheese	Dawn Boucher	2183 Gore Rd	Highgate Center	VT	05459	802-868-4168	bchrsfarm@together.net
Hope Farm	Barbara & Harvey Levin	P.O. Box 164	E. Charleston	VT	05833	802-723-4283	hopefarm@surfglobal.net
Jasper Hill Farm	Andy & Mateo Kehler	P.O. Box 272	Greensboro	VT	05841	802-533-2566	mateo@jasperhillfarm.com
Lake's End Cheese	Joanne James	212 West Shore Dr	Alburg	VT	05440	802-796-3730	info@lakesendcheeses.com
Lazy Lady Farm	Laini Fondiller	973 Snyderbrook Rd	Westfield	VT	05874	802-744-6365	laini@sover.net
Neighborly Cheese	Robert & Linda Dimmick	1362 Curtis Rd	Randolph Ctr	VT	05061	802-728-4700	neighborlyfarms@msn.com
Orb-Weaver Cheese	Marjorie Susman	3406 Lime Kiln Rd	New Haven	VT	05472	802-877-3755	orbweavr@together.net
Peaked Mountain Farm	Ann & Bob Works	P.O. Box 207	Townsend	VT	05353	802-365-4502	pkmtfarm@sover.net
Shelburne Farms	Jaime Yturriondobeitia	1611 Harbor Rd	Shelburne	VT	05482	802-985-8686	jyturriondobeitia@shelburnefarms.com
Taylor Farm	Jon & Kate Wright	825 Rte 11	Londonderry	VT	05148	802-824-5690	taylorfarm@adelphia.net
Thistle Hill Farms	John & Jeanine Putnam	107 Clifford Rd	North Pomfret	VT	05053	802-457-9349	info@thistlehillfarm.com
Three Owls Sheep Diary	Dan & Daphne Hewitt	P.O. Box 82	Granville	VT	05747	802-767-4127	cheese@threeowlsfarm.com
Twig Farm	Michael J. Lee	2575 South Bingham St	West Cornwall	VT	05778	802-462-3363	twigfarm@shoreham.net
Vermond Shepherd	David Major	915 Patch Rd	Putney	VT	05346	802-387-4437	vtshepherd@sover.net
West River Creamery	Charles Parant, III	P.O. Box 536	Londonderry	VT	05148	603-756-3869	westrivercreamery@verizon.net
Willow Hill Farm	Willow Smart	313 Hardscrabble Rd	Milton	VT	05468	802-893-2963	info@sheepcheese.com
Woodcock Farm	Mark Fischer	10 Turner Road	Weston	VT	05161	802-824-6538	mgfish02@sover.net

Appendix B: Additional Interviewees

In-State				**Out-of-State**		
American Cheese Society	Allison Hooper, President	Websterville		3D Cheese	Deborah Dickerson	Oakland, CA
Blythedale Farm	Thomas Loftus	Corinth		Artisan Made- Northeast	Tom Camm	Southbury, CT
Cheese Traders	Nancy Wright	Burlington		Blue Apron Cheese	Allen Palmer	Brooklyn, NY
Crawford Family Farm	Maria Trumpler	Whiting		C.E. Zuercher & Co., Inc.	Joseph Zuercher	Chicago, ILL
Hunger Mountain Co-Op	Deborah Messing	Montpelier		Cow Girl Creamery	Lenny Rice, Cheese Buyer	San Francisco, CA
Jasper Hill	Mateo and Andy Kehler	Greensboro		Farmstead Inc.	Terrence Geary	Providence, RI
Mary's Restaurant	Doug Mack	Bristol		Federal Express	Bill Humphries	Chicago, ILL
La Fromageie du Royaume	Neal D. Keeshin	Guildhall		Five Fifty-Five (Restaurant)	Michelle Corry	Portland, ME
Neighborly Farms	Linda Dimmick	Randolph		Freelance writer	Daphne Howland	Maine
Provisions	Sergio; Christopher Wainhouse	White River Jct.		Frommaggio's Kitchen	Robert Aquillero	Cambridge, MA
Shelburne Supermarket	Brad Miller	Shelburne		Good Taste Marketing	Carole Palmer	Washington, DC
Slow Food USA	Susan Buchanan	Burlington		Hanover Coop	Annie MacDonald	Hanover, NH
Smokejacks Restaurant	Cathleen Maloney, Gen Mgr.	Burlington		Massachusetts Institute of Technology	Heather Paxson	Cambridge, MA
Taftsville General Store	Charles Wilson	Taftsville		Murray's Cheese Shop	Sasha Davies	NYC
Taylor Farms	Jon Wright	Londonderry		NEDairy Promotion Board	Erin Coffield	Boston
Vermont Institute for Artisan Cheeses	Jeffrey Roberts	Burlington		Slow Food USA	Robert LaValva	New York City
Vermont Quality Meats	Paul Paulson	No. Clarendon		Slow Food USA	Makale Faber, Program Officer	Brooklyn, NY
Woodcock Farm	Mark Fischer	Weston		Whole Foods	Cathy Strange, Nat'l Cheese Buyer	Austin, TX
				Wisconsin Milk Promotion Board	Katie Noyser	Madison, Wisconsin

Appendix C:
Results of 2005 American Cheese Society Annual Competition

Vermont Farmstead Cheese Winners Listed Alphabetically by Cheesemaker, with Categories

Cobb Hill Cheese, Hartland, Vt.

- 1st place - - Ascutney Mountain (category: Farmstead Cheeses/Open Category, Cow's Milk)

Green Mountain Blue Cheese, Highgate Center, Vt.

- 1st place - - Gore-Dawn-Zola (category: Blue Mold Cheeses/Blue-Veined, Cow's Milk)

Jasper Hill Farm, Greensboro, Vt.

- 1st place - - Constant Bliss (category: Soft-Ripened Cheeses/Open Category, Cow's Milk)
- 2nd place - - Bayley Hazen Blue (category: Farmstead Cheeses/Open Category, Cow's Milk)

Neighborly Farms of Vermont, Randolph Center, Vt.

- 2nd place - - Monterey Jack (category: American Originals/Monterey Jack, Cow's Milk)
- 2nd place - - Green Onion Cheddar (category: Cheddars/Flavor Added)

Shelburne Farms, Shelburne, Vt.

- 1st place - - Herb Spread (category: Cheese Spreads/Flavor Added, All Milks)
- 2nd place - - Green Olive Spread (category: Cheese Spreads/Flavor Added, All Milks)
- 3rd place - - 2 Year Cheddar (category: Cheddars/Aged >25 Months)
- 3rd place - - 6 Month Cheddar (category: Cheddars/Cow's Milk, Aged <12 Months)

Taylor Farm, Londonderry, Vt.

- 1st place - - Maple Smoked Gouda (category: Smoked Cheeses/Open Category, Cow's Milk)

Willow Hill Farm, Milton, Vt.

- 3rd place - - Alderbrook (category: Soft-Ripened Cheeses/Sheep's or Mixed Milks)
- 3rd place - - Summertomme (category: American Made/International Style/Sheep's or Mixed Milks)
- 3rd place - - Vermont Brebis (category: Farmstead Cheeses/Open Category, Sheep's Milk)

The Woodstock Water Buffalo Co., South Woodstock, Vt.

- 3rd place - - Mozzarella – Ovalini (category: Italian-Type Cheeses/Fresh Mozzarella Types)

Appendix E: Cost of Cheese by Type

	Cow's Milk Cheeses	Quantity	Lb Price Wholesale	Lb Price Retail
C117	raw,cow	6,000.00	$7.00	
C117	raw,cow	1,000.00	$12.00	
C223	raw,swiss	7,800.00	$10.00	$12.50
C223	raw,caerphilly	4,200.00	$10.00	$12.50
C318	cow	6,377.00	$10.00	$18.00
C420	raw cheddar	1,960.00	$7.00	$10.00
C420	raw, chesire	1,400.00	$6.50	$9.50
C420	raw, natural rind	672.00	$9.00	$12.50
C420	raw, natural rind	800.00	$9.00	$13.00
C420	raw, smoked cheddar	1,288.00	$7.65	$11.00
C520	raw, washed rind	1,500.00	$11.00	$16.00
C620	raw 6 mo cheddar	32,900.00	$6.50	$12.00
C620	raw 1 yr cheddar	46,890.00	$6.75	$13.00
C620	raw 2 yr cheddar	14,000.00	$7.40	$15.00
C620	raw 3 year cheddar	14,000.00	$7.50	$16.00
C620	raw smoked cheddar	9,000.00	$9.00	$16.00
C620	raw clothbound cheddar	1,400.00	$12.00	$20.00
C727	raw, organic	14,000.00	$10.00	$14.99
C822	organic cow	92,000.00	$5.99	$7.50
C1022	raw	37,500.00	$7.00	$10.00
C929	raw, mold ripened	9,400.00	$10.80	$20.00
C929	raw, blue	25,614.00	$7.50	$15.00
C929	blue	1,010.00	$7.50	$15.00
C929	clothbound cheddar	1,260.00	$10.00	$20.00
C929	washed rind	147.00	$12.00	$25.00
S120	soft cow	2,640.00	$11.00	$15.00
	total pounds cow cheese	334,758.00		
	average price per pound ALL		**$8.84**	**$14.56**
	***av price minus aged cloth bound**		**$8.58**	**$14.06**

	Goat's Milk Cheeses	Quantity	Lb Price Wholesale	Lb Price Retail
G113	raw	1,500.00	$10.00	$14.00
G113	raw	500.00	$10.00	$14.00
G113	raw	1,000.00	$10.00	$14.00
G218	semi-ripe	5,000.00	$12.00	$16.00
G218	raw	2,000.00	$12.00	$16.00
G218	semi-ripe	1,000.00	$12.00	$16.00
G317	fresh chevre	5,000.00	$8.00	$12.00
G317	mold ripened	2,500.00	$11.00	$16.00
G317	mold ripened	300.00	$12.00	$18.00
G317	gouda	1,500.00	$8.00	$12.00
G317	aged gouda	700.00	$10.00	$15.00
G417	fresh chevre	3,000.00	$7.00	$10.00
G417	feta	1,100.00	$7.50	$10.00
G417	soft,ripened	500.00	$12.00	$16.00
G417	goat	850.00	$12.00	$16.00
G520	fresh goat	4,100.00	$9.00	$14.00
G520	aged gouda	1,000.00	$6.95	$9.95
G625	fresh	2,500.00	$8.00	$16.00
G625	raw, aged	1,500.00	$11.00	$22.00
G625	bloomy	500.00	$11.00	$22.00
G625	feta	500.00	$7.00	$14.00
	total pounds goat cheese	**36,550.00**		
	average wholesale/retail		**$10.32**	**$15.64**

	Sheep's Milk Cheeses	Quantity	Lb Price Wholesale	Lb Price Retail
S120	soft sheep	3,360.00	$12.00	$15.00
S120	hard sheep	960.00	$12.00	$15.00
S120	aged	320.00	$12.50	$15.00
S120	mixed milk	720.00	$12.50	$15.00
S218	feta	350.00	$6.00	$9.00
S218	tomme	700.00	$10.00	$14.00
S218	washed curd	350.00	$10.00	$14.00
S232	raw, aged	2,200.00	$10.00	$15.00
S323	raw, aged	3,000.00	$6.50	$10.00
S323	aged	1,200.00	$10.00	$15.00
S323	aged	1,000.00	$10.00	$15.00
S426	soft ripened	1,500.00	$10.00	$14.00
S426	soft,lactic	2,000.00	$8.00	$11.00
S426	semi-hard	2,000.00	$11.00	$17.00
S426	hard alpine	2,500.00	$12.00	$18.00
S527	aged, sheep	18,000.00	$13.50	$20.00
S631	raw, sheep	2,050.00	$10.00	$16.00
S7211	sheep & mixed	6,000.00	$11.00	$16.00
	Total Pounds sheep cheese	**48,210.00**		
	average wholesale/retail		**$10.38**	**$14.66**
	Water Buffallo Mozarella	Quantity 200,000.00		

Appendix F: Primary Distribution by Farm (by Code)

Note: These amounts are estimates based on survey results which varied in specificity

#	%	In-State	%	Out-of-State
G625	70%	Farmer's Mkt; from farm w/o distributor	30%	NYC; RI direct
G317	80%	Restuarants, Coops, w/o distributor		
S323	90%	Farmer's Mkt, Coops, Rest etc. Provisions	10%	Provisions
C223	60%	Farmer;s Mkt; from farm, Coops	40%	Provisions for 5% of sales
C520	100%	Coops, w/o distributor		
G417	90%	Farmer's Mkt, Coops, etc. w/o distributor	10%	NYC cheese shops direct
C318	71%	Squah Valley; Coops; Black River	29%	Artisan-Made NE; Provisions
S218	55%	Farmer's Mkt; from farm, restaraunts w/o distributor	45%	NYC, RI, w/o distributor
C929	?	Provisions	?	Provisions, Tamales Bay, SF, etc/
G520	100%	From farm; Farmer's Mkt & via VT Quality Meats		
G218	10%	Farmer's Mkt; Coops	90%	Provision; Black River etc.
C822	30%	w/o distributor	70%	Angello's Distributing, NYC
C117	100%	Coops, from farm, restaurants w/o distributor	0%	
S7211	40%	Farmer's Mkt, from the farm; coops w/o distributor	60%	w/o distributor
C620	30%	from Farm and Mail order	70%	Provisions; Tamales Bay; Artisinal Cheese etc
C1022	75%	Black River Produce	25%	Artisan-Made NE
C727	15%	Restuarants; Coops, w/o distributor	85%	w/o distributor
S631	100%	Farmer's Mkt; from the farm	0%	
G113	58%	Farmer's Mkt, Coops; w/o distributor	42%	w/o distributor
S527	90%	Coops, Mail Order, Restaurants; Provisions	10%	Provision, Tamales Bay; Great American Cheese
C420	15%	Farmer's Mkt; Mail order	85%	wholesale w/o distributor
S120	20%	Farmer's Mkts, Coops; Provisions, Metropolitan	80%	Provisions; Metropolitan; Heartland; Dairyland
S426	60%	Farmer's Mkt; coops; restaurants; VT Quality Meats	40%	direct to Boston. NYC

Appendix G:
Vermont Farmstead Cheese Retailers Survey - summary

Businesses: Hunger Mountain Co-Op, VT; Cheese Trader, VT; Healthy Living, S. Burlington; Taftsville Country Store, Taftsville; Shelburne Supermarket, Shelburne

Murray's, NYC; Tamales Bay, SF; Blue Apron, NYC; Farmstead, Inc., Providence, RI; Formaggio Kitchen, Cambridge, MA; Zuecher & Co., Chicago; Hanover Coop, Hanover, NH

1. How long have you been carrying Vermont farmstead cheeses in your store?

1 year	2 years	3 years	4 years	5 years	6 years	7 years	More than 7
		2			2		8

2. Roughly, how many VT Farmstead labels are you currently carrying?

1-3	4-6	7-10	More than 10
	3	4	4

3. Has this number increased this year? Yes: 12; generally up by 25 – 50% - "we can sell all we can get."

4. Please compare VT farmstead cheeses with **other domestic farmstead cheeses**, by:

	Better	Worse	Same
quality	10		2
price		1	11
availability	6	2	4
desirability	7		5

5. Please compare VT farmstead cheeses with **international farmstead cheeses**, by:

	Better	Worse	Same
quality	2	2	7
price	1	3	8
availability	3	6	3
desirability	8		4

6. Is there a maximum wholesale price per pound you are willing to pay? What is it?
West Coast & NYC: $15-16/lb wholesale – retails in high teens low 20's;
MA - $8 - $10 wholesale
VT – wholesale of $10-13 (retails $12- $15) strains the limits;
RI wholesale $8-12; retail, high teens; low 20's
Chicago - $10 wholesale average but some cheeses warrant $17/lb.

6. The best thing about VT Farmstead cheeses:

- the story behind them
- quality
- keeps farms going
- locally produced
- flavor & complexity
- quality of the milk

7. The worst thing about VT Farmstead cheeses:

- price
- availability
- consistency

8. What would you like to see more of?

- a system of coordinated deliveries
- diversity – more French and Spanish types

- more “specialty cheeses i.e. washed rinds, soft-ripened
- stinky cheeses
- sheep & Goat Munster
- more organic “basic” cheeses
- aged goat cheese and cow milk variety
- brie
- more consistent volume

9. Which one(s) do the best for you and why:
- Shelburne Farms; Blythedale; Jasper Hill; Peaked Mountain; Up A Creek; Thistle Hill – flavor, standards, consistency & price
- Taylor Farm (price);
- Twig Farm; Doe’s Leap (organic, quality)
- cow’s milk cheeses – most accessible to consumers